



Preparing for Tomorrow

CalPERS Educational Forum 2008

my|CalPERS: The Employer Link to CalPERS

Dev Berger, Liz Messner, Sylvia Stephens, and Tim Herrback
Public Employer Readiness Team



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Agenda

- Public Employer Readiness Team
- Educational Phases
- PERT Resources
- my|CalPERS Benefits to Employers
- my|CalPERS Walk-Through
- Next Steps
- Contact PERT
- Wrap-Up



Public Employer Readiness Team

- Project Manager: Rand Anderson
- Deputy Project Manager: Christina Forakis
- Web Conference Team Members:
 - Dev Berger
 - Liz Messner
 - Sylvia Stephens
 - Tim Herrback



Public Employer Readiness Team

- Employer Connection/Performance Activities
 - Deb Mooradian – Employer Contact & Vendor Management
 - Koren Lamar – Education Logistics
 - Suzette Loggins – Performance Metrics
 - Traci Veteto – Project Management
 - Rachael Hileman & Danny Rodriguez – Database Management



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Public Employer Readiness Team

- Communication Activities
 - Mary Gale – Web and Public Relations
 - Laura Munro – Technical Communications



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Educational Phases

- Phase One – Reporting Methods
(August through October 2008)
- Phase Two – Business policies and procedures and testing
(February through April 2009)
- Phase Three – Provide training on the new my|CalPERS
(July through October 2009)



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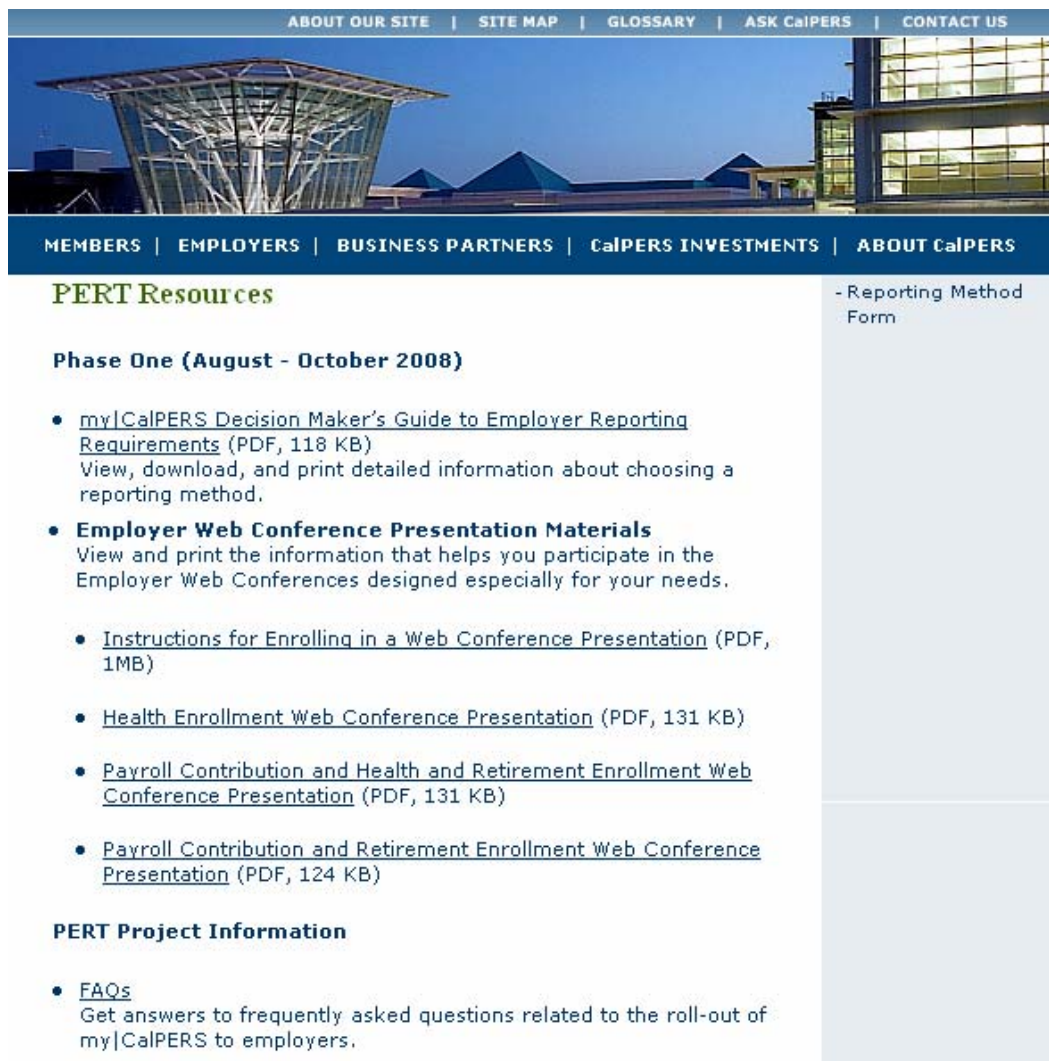
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PERT Resources

PERT Webpage:

www.calpers.ca.gov/pert

- Decision Maker's Guide
- Web Conference Materials
- File Formats
- Frequently Asked Questions



The screenshot shows the PERT Resources webpage. At the top is a navigation bar with links: ABOUT OUR SITE | SITE MAP | GLOSSARY | ASK CalPERS | CONTACT US. Below this is a large image of a modern building with a glass facade. Under the image is another navigation bar: MEMBERS | EMPLOYERS | BUSINESS PARTNERS | CalPERS INVESTMENTS | ABOUT CalPERS. The main content area is titled "PERT Resources" in green. It lists "Phase One (August - October 2008)" with several bullet points: a link to the "my|CalPERS Decision Maker's Guide to Employer Reporting Requirements" (PDF, 118 KB) with a description; "Employer Web Conference Presentation Materials" with a description; and four links to various web conference presentation PDFs (1MB, 131 KB, 131 KB, and 124 KB). On the right side, there is a vertical sidebar with the text "- Reporting Method Form". At the bottom, there is a section titled "PERT Project Information" with a link to "FAQs" and a description.

ABOUT OUR SITE | SITE MAP | GLOSSARY | ASK CalPERS | CONTACT US

MEMBERS | EMPLOYERS | BUSINESS PARTNERS | CalPERS INVESTMENTS | ABOUT CalPERS

PERT Resources

Phase One (August - October 2008)

- [my|CalPERS Decision Maker's Guide to Employer Reporting Requirements](#) (PDF, 118 KB)
View, download, and print detailed information about choosing a reporting method.
- **Employer Web Conference Presentation Materials**
View and print the information that helps you participate in the Employer Web Conferences designed especially for your needs.
 - [Instructions for Enrolling in a Web Conference Presentation](#) (PDF, 1MB)
 - [Health Enrollment Web Conference Presentation](#) (PDF, 131 KB)
 - [Payroll Contribution and Health and Retirement Enrollment Web Conference Presentation](#) (PDF, 131 KB)
 - [Payroll Contribution and Retirement Enrollment Web Conference Presentation](#) (PDF, 124 KB)

PERT Project Information

- [FAQs](#)
Get answers to frequently asked questions related to the roll-out of my|CalPERS to employers.

- Reporting Method Form



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PERT Resources

– File Formats

- File Structure
- Data Fields
- Data Elements

[MEMBERS](#) | [EMPLOYERS](#) | [BUSINESS PARTNERS](#) | [CalPERS INVESTMENTS](#) | [ABOUT CalPERS](#)

File Formats

Payroll Reporting

- [Payroll Contribution Reporting File](#) (PDF, 160 KB)
This sample file provides a list of data fields that you will be asked to provide CalPERS in the payroll reporting process.
- [Payroll File Schema](#)
Find the sample schema for the new payroll file.

Retirement Enrollment Reporting

- [Retirement Enrollment Reporting File](#) (PDF, 218 KB)
This sample file provides a list of data fields that you will be asked to provide CalPERS in the retirement enrollment process.
- [Enrollment Schema](#)
Find the sample schema for the new retirement and health enrollment files.

Health Enrollment Reporting

- [Health Enrollment Reporting File](#) (PDF, 403 KB)
This sample file provides a list of the data fields that you will be asked to provide CalPERS in the health enrollment process.
- [Enrollment Schema](#)
Find the sample schema for the new retirement and health enrollment files.
- [State Agency: Health Enrollment Reporting File](#) (PDF, 390 KB)
For State agencies, this sample file provides a list of data fields that you will be asked to provide CalPERS in the health enrollment process.

- Reporting Method
Form



my|CalPERS Benefits to Employers

Health Contracts:

- Employers can submit contract-related information online
- Employers can enroll members online
- Employers can make changes for members online

Retirement Contracts:

- Employers can submit contract-related information online
- Employers can submit costing scenarios and receive cost results online



my|CalPERS Benefits to Employers

Retirement Enrollment:

- Employers can correct enrollment transactions once they've been submitted
- Once appointment information is reported for employees, the new my|CalPERS will automatically associate this information with the appropriate benefits



my|CalPERS Benefits to Employers

Payroll:

- Errors will not hold up the entire report
(error-free records post automatically)
- Employers can convert payroll records from a previous report to a new report
- Employers can view reporting and contribution histories online
- Employers can add, delete or update payroll schedules



my|CalPERS Benefits to Employers

Service Credit Purchase:

- Employers can make changes to the service credit purchase payment schedule on behalf of the participant

Supplemental Income Plan:

- Employers can apply for a Supplemental Income Plan agreement, and upload the required completed agreement documents online. Modification or termination of your SIP agreement can also be done online.



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my|CalPERS Benefits to Employers

Multiple Report Accessibility:

- Submitted vs. Posted Contribution and Earning Report
- Member Buyback Status Report – service credit purchases
- Monthly Employer Billing Roster Report
- Annual Member Statement Employer Report



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my|CalPERS Walk-Through

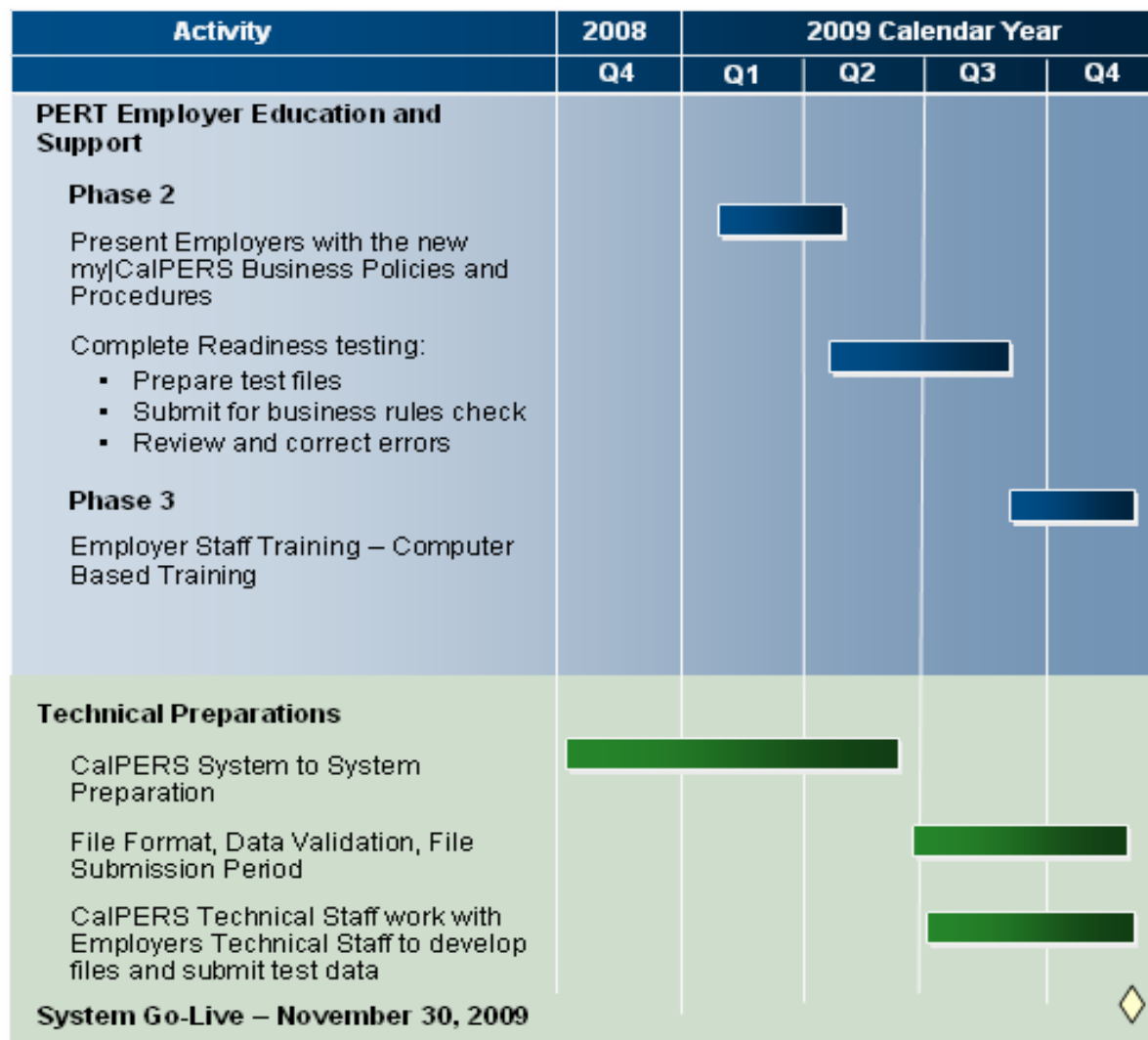


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Next Steps:

Phase Two
and Phase
Three
Timeline





Next Steps: Phase Two Readiness

- Phase Two will run from February through April 2009
- Present Employers with the new my|CalPERS Business Policies and Procedures that govern how data will be treated
- Complete readiness testing steps:
 - Prepare test file
 - Submit file to CalPERS for business rules check
 - Review and correct any errors
 - When the test file passes the business rules check, the Employer is ready



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Next Steps: Phase Three Readiness

- Phase Three will run from July through October 2009
- Train Employers and their staff on the new my|CalPERS
 - Deliver training through scheduled Web Conferences
 - Introduce new features, functions and capabilities



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Contact PERT

- PERT Email:
 - PERT4U@calpers.ca.gov
- Employer Contact Center (ERCC):
 - 888 CalPERS (or 888-225-7377)



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Wrap-Up

- Questions & Answers
- Evaluations
- Adjourn to Kiosk Room
- Visit PERT Booth

Thank you